6. Participant List

The Participant List window is the main dialog for accessing all functions within the Clinic application. The first step is to identify the participant and/or household group with which the WIC staff member will work. The Clinic application provides the Participant List functions to assist the user in locating the desired participant record. The system performs the same way whether the person in the Participant List is an applicant or a participant, except where explicitly noted in the documentation.

6.1 Menus

The Participant List menu bar provides mouse and keyboard access to functions within the Clinic application. The menu bar includes the following menus:

- File
- Participant List
- Activities
- Help

6.1.1 File Menu

The menu includes functionality for invoking the various global features of the Clinic application. Its mnemonic is "F". The menu includes the following:

- File
    - Waiting List
    - System Outputs
    - System Tools
    - Exit

6.1.1.1 Waiting List Menu Item

The menu item allows the user to invoke the Waiting List Management function. It is enabled when the menu is active. Its mnemonic is "W".

6.1.1.2 System Outputs Menu Item

The menu item allows the user to invoke the System Outputs function. It is enabled when the menu is active. Its mnemonic is "O".

6.1.1.3 System Tools Menu Item

The menu item allows the user to invoke the System Tools function. It is enabled when the menu is active. Its mnemonic is "S".

6.1.1.4 Exit Menu Item

The menu item allows the user to exit the Clinic application. It is enabled when the menu is active. Its mnemonic is "X".

6.1.2 File Menu Processes

6.1.2.1 Waiting List

When the Waiting List menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (WaitingList.View, Add or FullControl) to view the waiting list, a standard error dialog is invoked with the text, "You do not have the necessary permissions to View Waiting List. Please see the supervisor."

If the user has the appropriate permissions, the Manage Waiting List dialog defined in Clinic Chapter 02 – Waiting List is invoked.

6.1.2.2 System Outputs

When the System Outputs menu item is selected, it displays the following:

- System Outputs
    - Documents (mnemonic of "D")
    - Labels (mnemonic of "L")
    - Reports (mnemonic of "R")

6.1.2.2.1 Documents

When the Documents menu item is selected, the Generate Documents dialog defined in Clinic Chapter 13 – System Outputs is invoked.

6.1.2.2.2 Labels

When the Labels menu item is selected, then system will invoke the Generate Labels dialog defined in Clinic Chapter 13 – System Outputs.

6.1.2.2.3 Reports

When the Reports menu item is selected, the Generate Reports dialog defined in Clinic Chapter 13 – System Outputs is invoked.

6.1.2.3 System Tools

When the System Tools menu item is selected, it displays the following items:

- System Tools
    - Clear On-Site List (mnemonic of "O")
    - Change Password (mnemonic of "P")
    - Select Clinic (mnemonic of "C")
    - Set Default Printers (mnemonic of "D")

6.1.2.3.1 Clear On-Site List

When the Clear On-Site List menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (On-Site Group.FullControl) to clear the on-site list, a standard error dialog is invoked with the text, "You do not have the necessary permissions to Clear On-site List. Please see the supervisor."

If the user has the appropriate permissions, the system will clear the on-site list by deleting the Member.OnPremisesTime for the selected AgencyID and ServiceSiteID.

6.1.2.3.2 Change Password

When the Change Password menu item is selected, the Change Password dialog defined in Application Administration Chapter 02 – Security is invoked.

6.1.2.3.3 Select Clinic

When the Select Clinic menu item is selected, the Select Clinic of Operation dialog defined in Common Interface Panels Chapter S – System Tools is invoked.

6.1.2.3.4 Set Default Printers

When the Set Default Printers menu item is selected, the Default Printers dialog defined in Common Interface Panels Chapter S – System Tools is invoked.

6.1.2.4 Exit

When the Exit menu item is selected, the Clinic Application is closed.

If the Exit menu item is selected and the user has an open folder where updates are being made, the standard edits defined in Clinic Chapter 09 – Participant Folder are invoked.

6.1.3 Participant List Menu

This menu contains menu items that allow the user to access functions of the participant list. Its mnemonic is "P". The menu is enabled when the Participant List window is active. The Participant List menu is displayed as follows:

- Participant List
    - Toggle Applicant/Participant On-site
    - Schedule Appointment
    - Mark Appointment as Kept
    - Create New Member
    - Create New Household
    - Open Participant Folder

6.1.3.1 Toggle Applicant /Participant On-site Menu Item

The menu item allows the user to toggle whether the participant is considered to be on-site. The menu item is enabled when "On-site", "Local" or "Appointments for Today" is the current view of the participant list and an entry is selected in the Participant List grid. Its mnemonic is "T".

The menu item is disabled when the current view of the participant list grid is empty, when "Statewide" is the current view of the participant list or when no entry is selected in the Participant List grid.

6.1.3.2 Schedule Appointment Menu Item

The menu item allows the user to schedule an appointment for a selected participant. The menu item is enabled when "On-site" or "Local" is the current view of the participant list and an entry is selected in the Participant List grid. Its mnemonic is "S".

The menu item is disabled when the current view of the participant list grid is empty, when "Statewide" or "Appointments for Today" is the current view of the participant list or when no entry is selected in the Participant List grid.

6.1.3.3 Mark Appointment as Kept Menu Item

The menu item allows the user to indicate that the participant kept their appointment for today. The menu item is enabled when "Appointments for Today" is the current view and a participant record is selected in the list. Its mnemonic is "K".

The menu item is disabled when no selection is made or the current view is "On-site", "Local" or "Statewide".

6.1.3.4 Create New Member Menu Item

The menu item allows the user to create a new member within an existing household. The menu item is enabled when the "On-site", "Local" or "Appointments for Today" is the current view and a participant record is selected on the list. Its mnemonic is "M".

The menu item is disabled when no selection is made in the participant list or the current view is "Statewide".

6.1.3.5 Create New Household Menu Item

The menu item allows the user to create a new household within the system. The menu item is enabled when the Participant List menu is active. Its mnemonic is "H".

6.1.3.6 Open Participant Folder Menu Item

The menu item allows the user to open a participant's folder. The menu item is enabled when the Participant List menu is active and a participant record is selected on the participant list. Its mnemonic is "P".

The menu item is disabled when the current view of the participant list grid is empty or when no entry is selected in the Participant List grid.

6.1.4 Participant List Menu Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Menu.

6.1.4.1 Toggling a Participant as On-site

When the Toggle Participant as On-site menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (OnSiteGroup.Add or FullControl) to toggle a participant on-site, a standard error dialog is invoked with the text, "You do not have the necessary permissions to Mark Toggle Participant as On-Site. Please see the supervisor."

If the user has the appropriate permissions, the Toggle Participant as On-site dialog is invoked.

6.1.4.2 Scheduling an Appointment

When the Schedule Appointment menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (Appointments.Add or FullControl) to schedule an appointment, a standard error dialog is invoked with the text, "You do not have the necessary permissions to schedule appointments. Please see the supervisor."

If the user has the appropriate permissions, the Select Appointment to Schedule dialog defined in Clinic Chapter 08 – Appointment Scheduling is invoked.

6.1.4.3 Marking an Appointment as Kept

When the Mark Appointment as Kept menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (Appointment.Add or FullControl) to mark the participant's appointment as kept, a standard error dialog is invoked with the text, "You do not have the necessary permissions to Mark Appointment as Kept. Please see the supervisor."

When the Mark Appointment as Kept menu item:

- If the selected appointment is not a group education class, the system will set the Appointment.AppointmentKept value to "Y". The contents of the Scheduled Appointments display grid will then be refreshed.
- If the selected appointment is a group education class, the system will set the ClassEnrollment.EnrollmentKept value to "Y". The contents of the Scheduled Appointments display grid will then be refreshed.

6.1.4.4 Creating a New Member

When the Create New Member menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (Prescreening.Add) to create a new household member, a standard error dialog is invoked with the text, "You do not have the necessary permissions to create a new member. Please see the supervisor."

If the user has the appropriate permissions, the Applicant Prescreening dialog defined in Clinic Chapter 07 – Initial Contact is invoked with common demographic field information populated.

6.1.4.5 Creating a New Household

When the Create New Household menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (Prescreening.Add) to create a new household, a standard error dialog is invoked with the text, "You do not have the necessary permissions to create a new household. Please see the supervisor."

If the user has the appropriate permissions, the Applicant Prescreening dialog defined in Clinic Chapter 07 – Initial Contact is invoked.

6.1.4.6 Opening the Participant Folder

When the Open Participant Folder menu item is selected, the following processes are started:

6.1.4.6.1 Check Permissions to Open the Participant Folder

A check is performed to determine whether the logged-on user has View-level permission or better for the following features:

Demographics, Height/Weight Blood, Risk Factors, Nutrition Education, Income History, Referrals, Benefit issuance, Food Prescriptions, SOAP Notes, Breastfeeding Notes, General Notes, VENA History, Health Information, Immunizations, Breastfeeding Contacts, Breastpump Management, and Certifications.

- If the user does not have View-level permission for at least one of the features listed above, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view the Participant Folder. Please see the supervisor." When the error dialog is dismissed, focus is returned to the Participant List.
- If the user has View-level permission for any of the features listed above, the Open Participant Folder process continues.

6.1.4.6.2 Check for Participant Transfer

When the above-listed edits are completed successfully, if the participant selected in the Participant List is assigned to a clinic other than the one that was selected on the Location dialog (defined in Common Interface Panels Chapter R – Sign On Prompts) during the log on process, a standard confirmation dialog is invoked with the text, "Do you want to transfer this participant to this clinic?" The No button is the default for the dialog.

- If the user selects the No button on the confirmation dialog, the dialog is dismissed and focus is returned to the Participant List window.
- If the user selects the Yes button on the confirmation dialog, the process continues:

6.1.4.6.2.1 Check Permissions to Transfer a Participant

A check is performed to determine whether the logged-on user has full permission for transferring participants between clinics.

- If the user does not have full permission (ParticipantTransfer.FullControl) to transfer a participant between clinics, a standard error dialog is invoked with the text, "You do not have the necessary permissions to Transfer a Participant. Please see the supervisor." When the error dialog is dismissed, focus is returned to the Participant List.
- If the user has full permission (ParticipantTransfer.FullControl) to transfer a participant between clinics, the Open Participant Folder process continues.

6.1.4.6.2.2 Check for Enabled Electronic Benefit Transfer (EBT) Food Delivery System

When the above-listed edits are completed successfully, a check is performed to determine whether the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.)

- If the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic, a standard message dialog is invoked with the text, "This change to the Household must be communicated to the EBT system. The EBT Household Demographics dialog will open so the data can be sent. The change will only be saved after the successful EBT communication." When the OK button on the message dialog is selected, the EBT Household Demographics dialog defined in Clinic Chapter 11 - Food Instrument Production is invoked.
    - If the EBT Household Demographics dialog is canceled, or the demographics information cannot be transmitted successfully, the Participant Transfer process is terminated, the Open Participant Folder process is terminated, and a standard error dialog is invoked with the text, "The change was not saved because the EBT communication was canceled." When the error dialog is dismissed, focus is returned to the Participant List window.
    - If the EBT Household Demographics dialog is processed and the demographics information is transmitted successfully, the Transfer Particpant process continues.

- If the Electronic Benefit Transfer (EBT) food delivery system is not enabled for the clinic, the Transfer Participant process continues.

6.1.4.6.2.3 Transfer Participant

When the above-listed edits are completed successfully, the assigned clinic for the selected participant is changed to the clinic that was selected on the Location dialog (defined in Common Interface Panels Chapter R – Sign On Prompts) during the log on process, the Open Participant Folder process continues.

6.1.4.6.3 Open Participant Folder

When the above-listed edits are completed successfully, the Participant Folder window is invoked for the selected participant. The Participant Folder is defined in Clinic Chapter 09 – Participant Folder.

6.1.4.6.3.1 Check for Participant and Household Alerts

When the Participant Folder window is invoked, a check is performed to determine whether alerts exist for the participant or her household:

- If no alerts exist, focus is given to the Participant Folder window.
- If alerts exist, the following process is started:

6.1.4.6.3.1.1 Check Permissions to View Alerts

A check is performed to determine whether the logged-on user has permissions for viewing alerts. The following processes are repeated for each alert depending on its type:

- For a protected Alert:
    - If the user has the ProtectedAlert.View permission, the Display Alerts dialog defined in Chapter C – Display Alerts for Household Member is invoked, and the alert is added to the Alerts data grid, or if the Display Alerts dialog is already displayed, the alert is added to the Alerts data grid.
    - If the user does not have the ProtectedAlert.View permission, the Display Alerts dialog is not invoked, or if the Display Alerts dialog is already displayed, the alert is not added to the Alerts data grid.
- For an unprotected alert:

  - If the user has the Alert.View permission, the Display Alerts dialog defined in Chapter C – Display Alerts for Household Member is invoked, and the alert is added to the Alerts data grid, or if the Display Alerts dialog is already displayed, the alert is added to the Alerts data grid.
  - If the user does not have the Alert.View permission, the Display Alerts dialog is not invoked, or if the Display Alerts dialog is already displayed, the alert is not added to the Alerts data grid.

6.1.5 Activities Menu

This menu contains menu items that allow the user to perform functions on groups of participants. Its mnemonic is "A". This menu is enabled when the Participant List window is active. The Activities menu is displayed as follows:

- Activities
  - Work with On-site Group
  - View Appointments for Date
  - Reschedule Block of Appointments
  - View Participant Transfer History
  - Food Instrument Disposition
  - Peer Counselor Item Issuance History
  - Missed Appointments Follow-up
  - Record Replacement Item

6.1.5.1 Work with On-site Group Menu Item

The menu item allows the user to perform functions for the group of participants who are marked as on-site. The menu item is enabled when the Activities menu is active. Its mnemonic is "W".

6.1.5.2 View Appointments for Date Menu Item

The menu item will allow the user to view the appointments scheduled at a specific clinic on a specific date. The menu item is enabled when the Activities menu is active. Its mnemonic is "D".

6.1.5.3 Reschedule Block of Appointments Menu Item

The menu item will allow the user to reschedule a block of appointments to another date, time, and/or clinic. The menu item is enabled when the Activities menu is active. Its mnemonic is "R".

6.1.5.4 View Participant Transfer History Menu Item

The menu item will allow the user to view the transfer history for selected participants. The menu item is enabled when the Activities menu is active. Its mnemonic is "V".

6.1.5.5 Food Instrument Disposition Menu Item

The menu item will allow the user to review the current status of all food instruments that have been processed by the system. The menu item is enabled when the Activities menu is active. Its mnemonic is "F".

6.1.5.6 Peer Counselor Item Issuance History Menu Item

The menu item will allow the user to view the breastpump issuance history for the breastfeeding counselors. The menu item is enabled when the Activities menu is active. Its mnemonic is "T".

6.1.5.7 Missed Appointments Follow-up Menu Item

The menu item will allow the user to view a list of participants who missed their scheduled appointment. The menu item is enabled when the Activities menu is active. Its mnemonic is "I".

6.1.5.8 Record Replacement Item Menu Item

The menu item will allow the user to record that a replacement item was received from the manufacturer. The menu item is enabled when the Activities menu is active. Its mnemonic is "P".

6.1.6 Activities Menu Processes

6.1.6.1 Work with On-site Group

When the Work with On-site Group menu item is selected, the permissions of the logged-on user are checked to determine if they have the appropriate permissions (OnSiteGroup.View, Add or FullControl) to view the On-Site Group list. The system will then determine if the user has Add or FullControl level access for any of the following features; WIC Benefit Issuance, Farmers Market Benefit Issuance, or Nutrition Education. If the user does not have the OnSiteGroup.View permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view On-site Group. Please see the supervisor."

If the user has the appropriate permissions, the Work with On-site Group dialog described in this document is invoked.

6.1.6.2 View Appointments for Date

When the View Appointments for Date menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (Appointment.View, Add or FullControl) to view the appointments scheduled for a specific date at a particular clinic within the agency the user indicated when logging onto the system, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view appointments for date. Please see the supervisor."

If the user has the appropriate permissions, the View Appointments for Date dialog defined in Clinic Chapter 08 – Appointment Scheduling is invoked.

6.1.6.3 Reschedule Block of Appointments

When the Reschedule Block of Appointments menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (Appointment.FullControl) to schedule appointments, a standard error dialog is invoked with the text, "You do not have the necessary permissions to reschedule a block of appointments. Please see the supervisor."

If the user has the appropriate permissions, the Reschedule Block of Appointments dialog defined in Clinic Chapter 08 – Appointment Scheduling is invoked.

6.1.6.4 View Participant Transfer History

When the View Participant Transfer History Menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (ParticipantTransfer.View or FullControl) to view participant transfer history, a standard error dialog is invoked with the text, "You do not have the necessary permissions to View Participant Transfer History. Please see the supervisor."

If the user has the appropriate permissions, the View Participant Transfer History dialog defined in this document is invoked.

6.1.6.5 Food Instrument Disposition

When the Food Instrument Disposition menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (CheckIssuance.View, Add or FullControl) to view food instruments, a standard error dialog is invoked with the text, "You do not have the necessary permissions to View Food Instrument Disposition. Please see the supervisor."

If the user has the appropriate permissions, the Food Instrument Search dialog defined in Clinic Chapter 03 – Food Instrument Disposition is invoked.

6.1.6.6 Peer Counselor Item Issuance History

When the Peer Counselor Item Issuance History menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (BreastfeedingItemIssuance.View, Add or FullConrol) to view breastpump issuance history, a standard error dialog is invoked with the text, "You do not have the necessary permissions to View Breastpump Issuance History. Please see the supervisor."

If the user has the appropriate permissions, the Breastfeeding Counselor Item Issuance History dialog defined in Common Interface Panels Chapter P – Breastpumps, Breastfeeding Kits and Supplies is invoked.

6.1.6.7 Missed Appointments Follow-up

When the Missed Appointments Follow-up menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (Appointment.FullControl) to schedule appointments, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view missed appointment follow-up information. Please see the supervisor."

If the user has the appropriate permissions, the Missed Appointments Follow-up dialog defined in Clinic Chapter 08 – Appointment Scheduling is invoked.

6.1.6.8 Record Replacement Item

When the Record Replacement Item menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (BreastfeedingItemIssuance.Add or FullControl) to update breastpump information, a standard error dialog is invoked with the text, "You do not have the necessary permissions to update breastpump information. Please see the supervisor."

If the user has the appropriate permissions to perform the Record Replacement Item function, the Record Replacement Item dialog defined in State Office Chapter 07 – Participant Search, Folder and Summary (SO) is invoked.

6.1.7 Help Menu

The Help menu is provided to assist the user in finding answers to questions about how to use the Clinic application. The menu item is enabled when the File menu is accessible. Its mnemonic is "H". The Help menu is displayed as follows:

- Help
  - Help on Screen
  - WIC Help Topics
  - About

6.1.7.1 Help on Screen

The menu item will allow the user to view panel-level help for the currently invoked screen. The menu item is enabled when the Help Menu is active. Its mnemonic is "S" and its shortcut key is "F1".

6.1.7.2 WIC Help Topics Menu Item

The menu item will allow the user to view a list of help topics for the WIC system. The menu item is enabled when the Help Menu is active. Its mnemonic is "W"

6.1.7.3 About WIC Menu Item

The menu item allows the user to view information about the software. The menu item is enabled when the Help Menu is active. Its mnemonic is "A"

6.1.8 Help Menu Processes

6.1.8.1 Help on Screen

When the Help on Screen menu item is selected, the Clinic application panel level help is invoked. This function is also invoked when pressing the F1 key.

6.1.8.2 WIC Help Topics

When the WIC Help Topics menu item is selected, the Clinic Help System is invoked at the Index tab.

6.1.8.3 About WIC

When the About WIC menu item is selected, the About WIC application information dialog is invoked.

6.1.9 Toolbar

This Toolbar contains items for invoking the various features of the Clinic application.

Figure 1 - Participant List Toolbar

6.1.9.1 Manage Waiting List Toolbar Button

This toolbar button allows the user to manage the waiting list. It is enabled when the Participant List is active. It has a tool tip text of "Manage Waiting List".

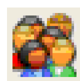

Figure 2 - Manage Waiting List Toolbar Button

6.1.9.2 System Outputs Toolbar Button

This toolbar button allows the user to invoke the System Outputs function. It is enabled when the Participant List is active. It has a tool tip text of "System Outputs".

Figure 3 - System Outputs Toolbar Button

6.1.9.3 System Tools Toolbar Button

This toolbar button allows the user to invoke the System Tools function. It is enabled when the Participant List is active. It has a tool tip text of "System Tools".

Figure 4 - System Tools Toolbar Button

6.1.9.4 Exit Toolbar Button

This toolbar button allows the user to exit the Clinic application. It is enabled when the Participant List is active. It has a tool tip text of "Exit Clinic Application".

Figure 5 - Exit Toolbar Button

6.1.9.5 Toggle Participant On-site Toolbar Button

This toolbar button allows the user to toggle the participant on-site. This toolbar button is enabled when "On-site", "Local" or "Appointments for Today" is the current view and a participant record is selected on the participant list. It has a tool tip text of "Toggle Applicant/Participant On-site".

Figure 6 - Toggle Participant On-site Toolbar Button

6.1.9.6 Schedule Appointment Toolbar Button

The toolbar button is enabled when the Participant Folder is active. This toolbar button is enabled when the "On-site" or "Local" is the current view and a participant record is selected on the participant list. It has a tool tip text of "Schedule Appointment".

Figure 7 - Schedule Appointment Toolbar Button

6.1.9.7 Create New Member Toolbar Button

This toolbar button allows the user to create a new member within an existing household. This toolbar button is enabled when the "On-site", "Local" or "Appointments for Today" is the current view and a participant record is selected on the participant list. It has a tool tip text of "Create New Member".

Figure 8 - Create New Member Toolbar Button

6.1.9.8 Create New Household Toolbar Button

This toolbar button allows the user to create a new household within the system. This toolbar button is enabled when the Participant List window is active. It has a tool tip text of "Create New Household".

Figure 9 - Create New Household Toolbar Button

6.1.9.9 Open Participant Folder Toolbar Button

This toolbar button allows the user to open a participant's folder. This toolbar button is enabled when the Participant List window is active and a participant record is selected on the participant list. It has a tool tip text of "Open Participant Folder."

Figure 10 - Open Participant Folder Toolbar Button

6.1.10 Toolbar Processing

6.1.10.1 Waiting List

When the Waiting List toolbar button is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (WaitingList.View, Add or FullControl) to view the waiting list, a standard error dialog is invoked with the text, "You do not have the necessary permissions to View Waiting List. Please see the supervisor."

If the user has the appropriate permissions, the Manage Waiting List dialog defined in Clinic Chapter 02 – Waiting List is invoked.

6.1.10.2 System Outputs

When the System Outputs toolbar button is selected, the menu displays the following items:

- System Outputs
  - Documents (mnemonic of "D")
  - Labels (mnemonic of "L")
  - Reports (mnemonic of "R")

6.1.10.2.1 Documents

When the Documents menu item is selected, the Generate Documents dialog defined in Clinic Chapter 13 – System Outputs is invoked.

6.1.10.2.2 Labels

When the Labels menu item is selected, then system will invoke the Generate Labels dialog defined in Clinic Chapter 13 – System Outputs.

6.1.10.2.3 Reports

When the Reports menu item is selected, the Generate Reports dialog defined in Clinic Chapter 13 – System Outputs is invoked.

6.1.10.3 System Tools

When the System Tools toolbar button is selected, the menu displays the following items:

- System Tools
    - Clear On-Site List (mnemonic of "O")
    - Change Password (mnemonic of "P")
    - Select Clinic (mnemonic of "C")
    - Set Default Printers (mnemonic of "D")

6.1.10.3.1 Clear On-Site List

When the Clear On-Site List menu item is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (OnSiteGroup.FullControl) to clear the on-site list, a standard error dialog is invoked with the text, "You do not have the necessary permissions to Clear On-site List. Please see the supervisor."

If the user has the appropriate permissions, the system will clear the on-site list by deleting the Member.OnPremisesTime for the selected AgencyID and ServiceSiteID.

6.1.10.3.2 Change Password

When the Change Password menu item is selected, the Set Password dialog defined in Application Administration Chapter 2 – Security is invoked.

6.1.10.3.3 Select Clinic

When the Select Clinic menu item is selected, the Select Clinic of Operation dialog defined in Common Interface Panels Chapter S – System Tools is invoked.

6.1.10.3.4 Set Default Printers

When the Set Default Printers menu item is selected, the Default Printers dialog defined in Common Interface Panels Chapter S – System Tools is invoked.

6.1.10.4 Exit

When the Exit toolbar button is selected, the Clinic Application is closed.

If the Exit toolbar button is selected and the user has an open folder where updates are being made, the standard edits defined in Clinic Chapter 09 – Participant Folder is invoked.

6.1.10.5 Toggle Participant On-site

When the Toggle Participant On-site toolbar button

The permissions of the logged-on user are checked. If the user does not have the appropriate permissions (OnSiteGroup.Add or FullControl) to toggle a participant on-site, a standard error dialog is invoked with the text, "You do not have the necessary permissions to Mark Toggle Participant as On-Site. Please see the supervisor."

If the user has the appropriate permissions, the Toggle Participant as On-site dialog defined in this document is invoked.

6.1.10.6 Schedule Appointment

When the Schedule Appointment toolbar button is selected, if the user does not have the appropriate permissions (Appointments.Add or FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to schedule appointments. Please see the supervisor."

If the user has the appropriate permissions, the Select Appointment to Schedule dialog defined in Clinic Chapter 08 – Appointment Scheduling is invoked.

6.1.10.7 Create New Member

When the Create New Member toolbar button is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (Prescreening.Add) to create a new household member, a standard error dialog is invoked with the text, "You do not have the necessary permissions to create a new member. Please see the supervisor."

If the user has the appropriate permissions, the Applicant Prescreening dialog defined in Clinic Chapter 07 – Initial Contact is invoked with common demographic field information populated.

6.1.10.8 Create New Household

When the Create New Household toolbar button is selected, a check is performed to determine the permissions of the logged-on user. If the user does not have the appropriate permissions (Prescreening.Add) to create a new household, a standard error dialog is invoked with the text, "You do not have the necessary permissions to create a new household. Please see the supervisor."

If the user has the appropriate permissions, the Applicant Prescreening dialog defined in Clinic Chapter 07 – Initial Contact is invoked.

6.1.10.9 Open Participant Folder

When the Open Participant Folder toolbar button is selected, the following processes are started:

6.1.10.9.1 Check Permissions to Open the Participant Folder

A check is performed to determine whether the logged-on user has View-level permission or better for the following features:

Demographics, Height/Weight Blood, Risk Factors, Nutrition Education, Income History, Referrals, Benefit issuance, Food Prescriptions, SOAP Notes, Breastfeeding Notes, General Notes, VENA History, Health Information, Immunizations, Breastfeeding Contacts, Breastpump Management, and Certifications.

- If the user does not have View-level permission for at least one of the features listed above, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view the Participant Folder. Please see the supervisor." When the error dialog is dismissed, focus is returned to the Participant List.
- If the user has View-level permission for any of the features listed above, the Open Participant Folder process continues.

6.1.10.9.2 Check for Participant Transfer

When the above-listed edits are completed successfully, if the participant selected in the Participant List is assigned to a clinic other than the one that was selected on the Location dialog (defined in Common Interface Panels Chapter R – Sign On Prompts) during the log on process, a standard confirmation dialog is invoked with the text, "Do you want to transfer this participant to this clinic?" The No button is the default for the dialog.

- If the user selects the No button on the confirmation dialog, the dialog is dismissed and focus is returned to the Participant List window.

- If the user selects the Yes button on the confirmation dialog, the process continues:

6.1.10.9.2.1 Check Permissions to Transfer a Participant

A check is performed to determine whether the logged-on user has full permission for transferring participants between clinics.

- If the user does not have full permission (ParticipantTransfer.FullControl) to transfer a participant between clinics, a standard error dialog is invoked with the text, "You do not have the necessary permissions to Transfer a Participant. Please see the supervisor." When the error dialog is dismissed, focus is returned to the Participant List.
- If the user has full permission (ParticipantTransfer.FullControl) to transfer a participant between clinics, the Open Participant Folder process continues.

6.1.10.9.2.2 Check for Enabled Electronic Benefit Transfer (EBT) Food Delivery System

When the above-listed edits are completed successfully, a check is performed to determine whether the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.)

- If the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic, a standard message dialog is invoked with the text, "This change to the Household must be communicated to the EBT system. The EBT Household Demographics dialog will open so the data can be sent. The change will only be saved after the successful EBT communication." When the OK button on the message dialog is selected, the EBT Household Demographics dialog defined in Clinic Chapter 11 - Food Instrument Production is invoked.
    - If the EBT Household Demographics dialog is canceled, or the demographics information cannot be transmitted successfully, the Participant Transfer process is terminated, the Open Participant Folder process is terminated, and a standard error dialog is invoked with the text, "The change was not saved because the EBT communication was canceled." When the error dialog is dismissed, focus is returned to the Participant List window.

- If the EBT Household Demographics dialog is processed and the demographics information is transmitted successfully, the Transfer Particpant process continues.

- If the Electronic Benefit Transfer (EBT) food delivery system is not enabled for the clinic, the Transfer Participant process continues.

6.1.10.9.2.3 Transfer Participant

When the above-listed edits are completed successfully, the assigned clinic for the selected participant is changed to the clinic that was selected on the Location dialog (defined in Common Interface Panels Chapter R – Sign On Prompts) during the log on process, the Open Participant Folder process continues.

6.1.10.9.3 Open Participant Folder

When the above-listed edits are completed successfully, the Participant Folder window is invoked for the selected participant. The Participant Folder is defined in Clinic Chapter 09 – Participant Folder.

6.1.10.9.3.1 Check for Participant and Household Alerts

When the Participant Folder window is invoked, a check is performed to determine whether alerts exist for the participant or her household:

- If no alerts exist, focus is given to the Participant Folder window.
- If alerts exist, the following process is started:

6.1.10.9.3.1.1 Check Permissions to View Alerts

A check is performed to determine whether the logged-on user has permissions for viewing alerts. The following processes are repeated for each alert depending on its type:

- For a protected Alert:
  - If the user has the ProtectedAlert.View permission, the Display Alerts dialog defined in Chapter C – Display Alerts for Household Member is invoked, and the alert is added to the Alerts data grid, or if the Display Alerts dialog is already displayed, the alert is added to the Alerts data grid.

  - If the user does not have the ProtectedAlert.View permission, the Display Alerts dialog is not invoked, or if the Display Alerts dialog is already displayed, the alert is not added to the Alerts data grid.

- For an unprotected alert:
  - If the user has the Alert.View permission, the Display Alerts dialog defined in Chapter C – Display Alerts for Household Member is invoked, and the alert is added to the Alerts data grid, or if the Display Alerts dialog is already displayed, the alert is added to the Alerts data grid.
  - If the user does not have the Alert.View permission, the Display Alerts dialog is not invoked, or if the Display Alerts dialog is already displayed, the alert is not added to the Alerts data grid.

6.2 Participant List

The initial dialog of the WIC system allows the user to reach all functions of the system, including the Participant Folder, WIC Certification, Waiting List Management, System Outputs and System Tools. The Participant List is the hub of the WIC Clinic application. This section describes the various functions for searching and displaying the participant list. The Participant list can be sorted and displayed in several ways.

This criterion is the current view of the participant list. The current view is initially set according to the defaults for the user currently logged into the system. When the Search button is selected, the current view of the Participant List will refresh to the value selected in the "Where to Search" radio button group.

The user can view the "Statewide" database to search all "Local" databases for all WIC participants. This allows the user to transfer participant information between clinics.

The title bar and columns of each dialog will change to reflect the selected View.

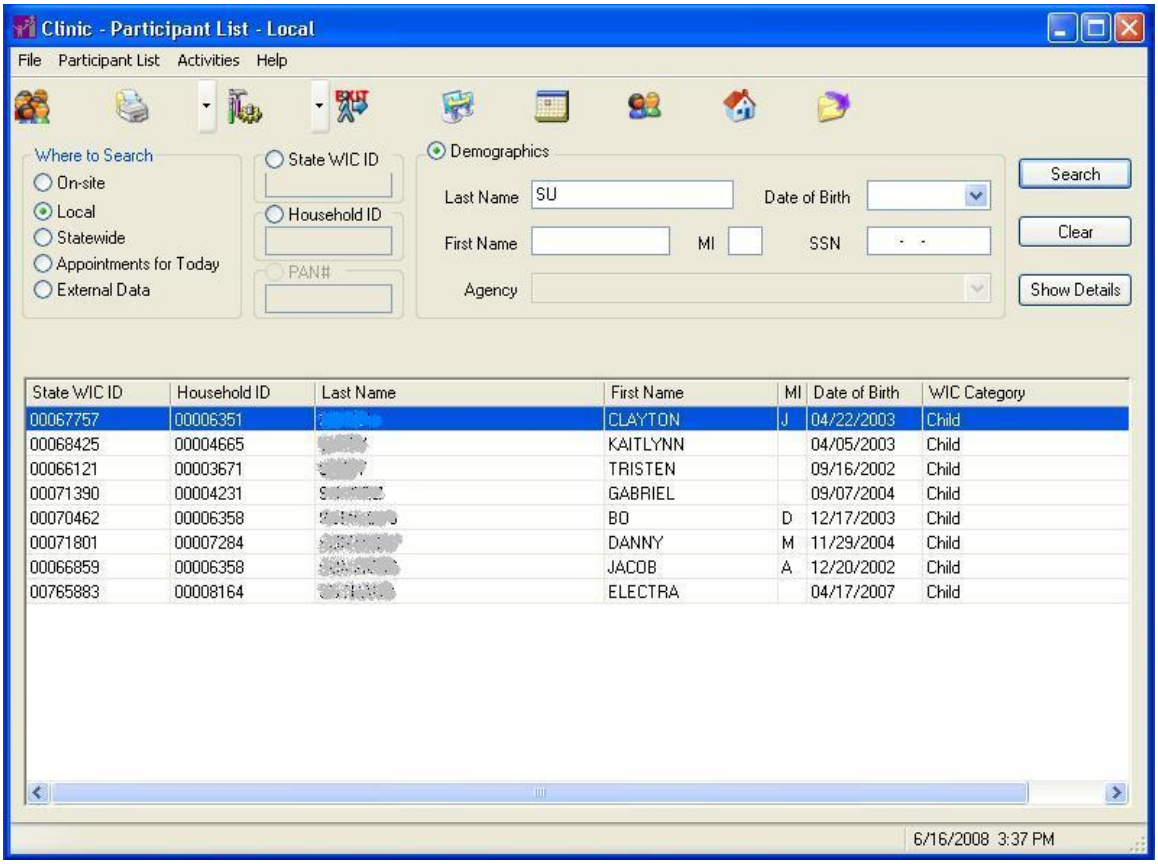

Figure 11 - Participant List – (Details Hidden)

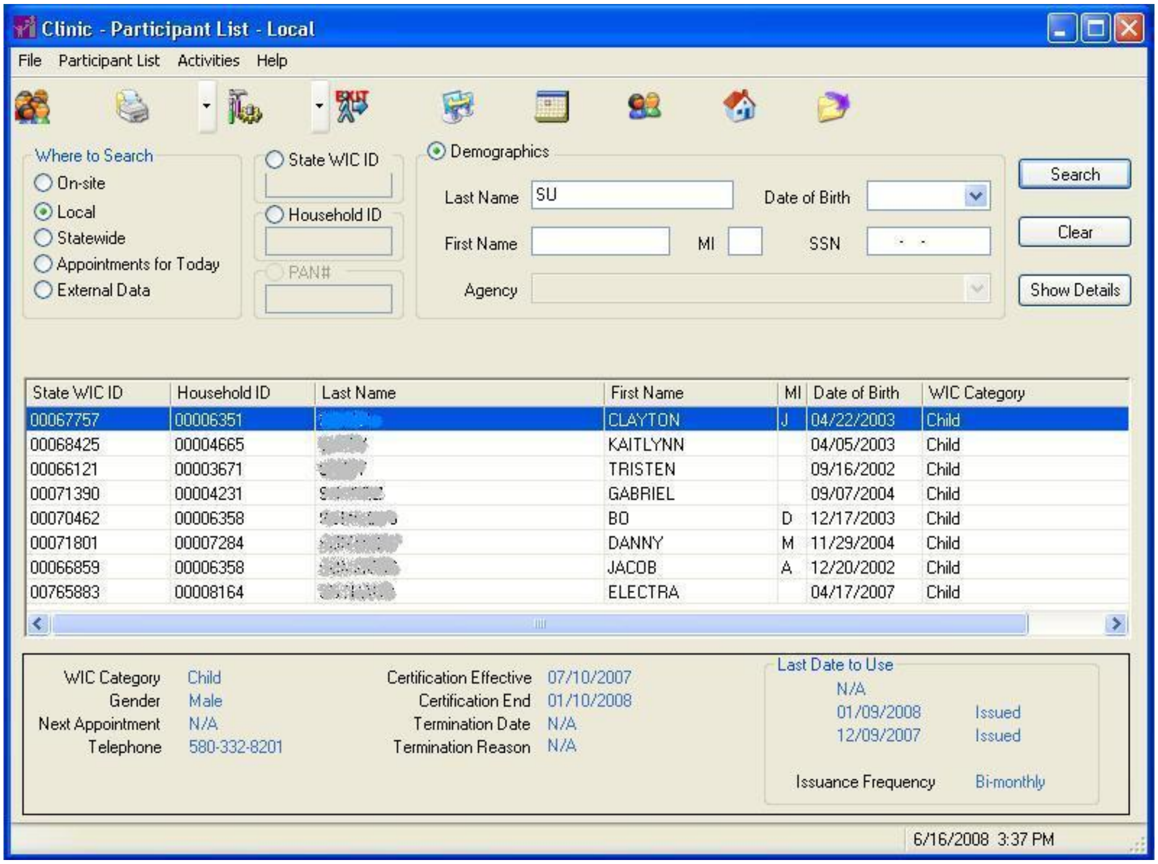

Figure 12 - Participant List - (Details Shown)

6.2.1 Controls

This section describes the behavior of the controls on the Participant List window.

6.2.1.1 Where to Search Radio Button Group

The control allows the user to indicate which view to search for a participant. The radio button group includes the following buttons:

- On-site
- Local
- Statewide
- Appointments for Today
- External Data

The radio button group is enabled when the dialog is active. The initially selected radio button from this group will correspond to the currently selected view of the participant list. Selection of the "Statewide" radio button will search all Clinics. The "External Data" radio button is enabled when the system is configured to interface with an external data store. One radio button in the group must be selected.

When selecting either the "Local", "Statewide" or "External Data" radio button, additional search criteria is required.

When selecting either the "On-site" or "Appointments for Today" radio button, additional search criteria is optional. State WIC ID is not required even though the radio button defaults to "selected".

6.2.1.2 State WIC ID Radio Button and Masked Edit Box

The radio button is enabled when the Participant List is active. When this radio button is selected, the State WIC ID masked edit box is enabled. Otherwise the masked edit box is disabled. It allows the entry of alphabetic and numeric characters.. The mask for the box is "########". If less than the maximum number of digits is entered into the masked edit box, it will be padded with preceding zeros.

6.2.1.3 Household ID Radio Button and Masked Edit Box

The radio button is enabled when the Participant List is Active. When this radio button is selected, the Household ID masked edit box is enabled. Otherwise, the masked edit box is disabled. It allows the entry of alphabetic and numeric characters. The mask for the box is "########". If less than the maximum number of digits is entered into the masked edit box, it will be padded with preceding zeros.

6.2.1.4 PAN# Radio Button

The control allows the selection of the PAN (Primary Account Number) as the search criteria. It is enabled when the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic and the Participant List window is active. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.)

6.2.1.4.1 PAN# Text Box

The control accepts a PAN by which to search for a participant. It is enabled when the radio button is selected. Characteristics for the PAN# text box are defined in the Consistencies chapter.

NOTE: Multiple PANs may be linked to the Household EBT Account, since cards become deteriorated or are lost. The search will result in the household linked to the card number.

6.2.1.5 Demographics Radio Button

The radio button is enabled when the Participant List is Active. When this radio button is selected, the demographic controls become enabled. Otherwise, the Demographic controls is disabled.

6.2.1.6 Demographics - Last Name Text Box

The control allows the user to enter a complete or partial last name as search criteria. The text box is enabled when the Demographic radio button is selected. The maximum length allowed for the value is twenty-five (25) characters. It allows the entry of alphabetic characters, spaces, and the following special characters: {' . , -}. Alphabetic characters are converted to uppercase.

6.2.1.7 Demographics - First Name Text Box

The control allows the user to enter a complete or partial first name as search criteria. The text box is enabled when the Demographic radio button is selected. It allows the entry of alphabetic characters, spaces, and the following special characters: {' . , -}. Alphabetic characters are converted to uppercase. The maximum length allowed for the value is twenty (20) characters.

6.2.1.8 Demographics - Middle Initial Text Box (MI)

The control allows the user to enter the middle initial as search criteria. The text box is enabled when the Demographic radio button is selected. It allows the entry of alphabetic characters. Alphabetic characters are converted to uppercase. The maximum length allowed for the value is one (1) character.

6.2.1.9 Demographics – SSN Masked Edit Box (SSN)

The control allows the user to enter the social security number as search criteria. The masked edit box is enabled when the Demographics radio button is selected and the HideSSN business rule is set to "N". It allows the entry of numeric characters. The mask for the box is "###-##-###". If the HideSSN business rule is set to "Y", the masked edit box will not be visible.

6.2.1.10 Demographics – Date of Birth Masked Edit Box

The control allows the user to select the Date of Birth as search criteria. The masked edit box is enabled when the Demographics radio button is selected. It allows the entry of numeric characters. The mask for the box is "##/##/####" to accept a date with a four-digit year.

6.2.1.11 Agency Drop-down List

The drop-down list is enabled when the Demographics radio button is selected. Characteristics for the Agency drop-down list are defined in the Consistencies chapter.

6.2.1.12 Search button

The Search button is enabled when the Participant List window is active. Its mnemonic is "S".

6.2.1.13 Clear button

The Clear button is enabled when the Participant List window is active. Its mnemonic is "C".

6.2.1.14 Show/Hide Details button

The Show/Hide button is enabled when the Participant List window is active. Its mnemonic is "D".

6.2.1.15 Participant List Grid (All Views)

The control allows the user to select the appropriate participant with which to work. Double-clicking on a participant's record in the grid will open the participant folder for the selected participant.

6.2.1.15.1 Grid Content

The grid content will vary depending on selection made in the "Where to Search" radio button group:

6.2.1.15.1.1 The On-site View

In the "**On-site" view**, the participant list will be initially sorted by ascending On-site Time. The first entry is initially selected.

The participant list grid will contain the following columns:

- On-site Time
- State WIC ID
- Household ID
- Last Name
- First Name
- Middle Initial (MI)
- Date of Birth
- WIC Category

6.2.1.15.1.2 The Local View

In "**Local**" view, the participant list will be initially sorted by Last Name, First Name and Middle Initial. The first entry is initially selected. The participant list grid will contain the following columns:

- State WIC ID
- Household ID
- Last Name
- First Name
- Middle Initial (MI)
- Date of Birth
- WIC Category

6.2.1.15.1.3 The Statewide View

In the **"Statewide"** view, the participant list will be initially sorted by Last Name, First Name, and Middle Initial. The first entry is initially selected. The participant list grid will contain the following columns:

- State WIC ID
- Household ID
- Last Name
- First Name
- Middle Initial (MI)
- Date of Birth
- WIC Category
- Gender
- Agency Number
- Clinic Number

6.2.1.15.1.4 The Appointments for Today View

In the "**Appointments for Today**" view, the participant list will be initially sorted by Appointment Time, Appointment Type, Last Name, First Name and Middle Initial. The first entry is initially selected. The participant list grid will contain the following columns:

- Appointment Time (Appt Time)
- Appointment Type (Appt Type)
- Kept
- State WIC ID
- Household ID
- Last Name
- First Name
- Middle Initial (MI)
- Date of Birth
- WIC Category
- Resource

6.2.1.15.1.4.1 The Kept Column

The Kept column of the Participant List Grid displays a check box that indicates whether the participant has kept her appointment. The initial state of the check box for each participant displayed in the grid is determined as follows:

- If an appointment is not a group education class the system will check the Appointment.AppointmentKept value. If the value is "Y", the check box is initially selected. If the value is "N", the check box will initially be cleared.
- If an appointment is a group education class the system will check the ClassEnrollment.EnrollmentKept value. If the value is "Y", the check box is initially selected. If the value is "N", the check box will initially be cleared.

When a Kept check box is clicked, the system checks the permissions for the logged-on user as follows:

- If the user does not have the appropriate permissions (Appointment.Add or FullControl) to mark the participant's appointment as kept or missed, a standard error dialog is invoked with the text, "You do not have the necessary permissions to update kept. Please see the supervisor."

- If the user has the appropriate permissions (Appointment.Add or FullControl), the system will allow the check boxes to be selected or cleared. When the state of any check box in the Kept column is changed, an Update Kept button is displayed.

6.2.1.15.1.4.1.1 Update Kept Button

The Update Kept button is hidden until the state of any check box in the Kept column is changed. After the state of a check box in the Kept column has changed, the Update Kept button is displayed above the Kept column and enabled.

This button is used to apply changes made to the check boxes in the Kept column.

6.2.1.15.1.5 The External Data View

In the "**External Data**" view, the participant list will be initially sorted by Last Name, First Name and Middle Initial. The first entry is initially selected. The participant list grid will contain the following columns:

- The External Data's ID Number (DCN)*
- Social Security Number (SSN)
- Last Name
- First Name
- Middle Initial (MI)
- Date of Birth
- Gender

*The column label for the External Data's ID can be customized, by use of a business rule, to best describe the ID number.

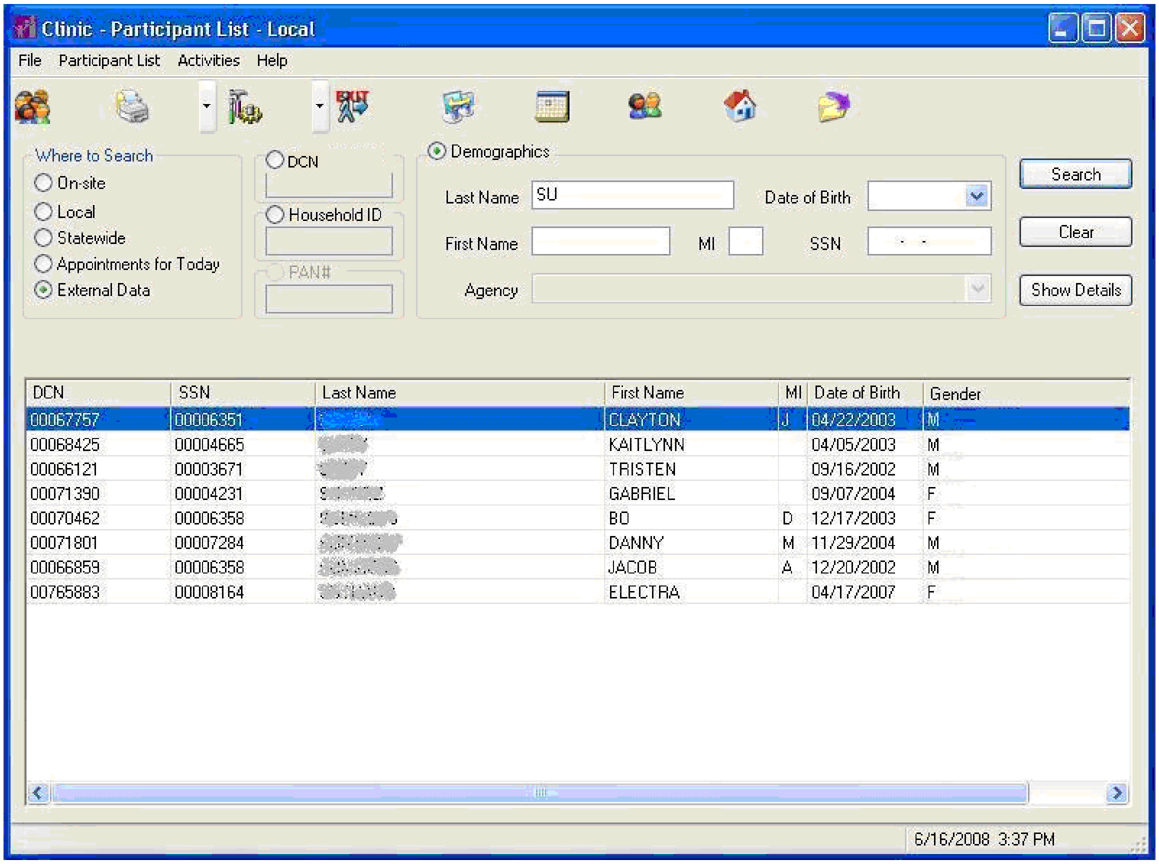

Figure 13 - Participant List – (External Data Search)

6.2.1.16 Detail Panel - WIC Category Text and Value Label

The control is displayed when the Show Details panel is active. The control allows the user to view the WIC Category at the most recent certification for the participant selected in the participant list. The value label will invoke the lookup value corresponding to the WIC-Status column of the MEMBER table. It will invoke as read-only in the inverse color of the form. Note that the control does not get focus and is not included in the tab order of the dialog.

6.2.1.17 Detail Panel - Gender Text and Value Label

The control is displayed when the Show Details panel is active. The control allows the user to view the gender of the participant selected in the participant list. The value label will invoke the lookup value corresponding to the Gender field of the MEMBER table. It will invoke as read-only text in the inverse color of the form. Note that the control does not get focus and is not included in the tab order of the dialog.

6.2.1.18 Detail Panel - Next Appointment Text and Value Label

The control is displayed when the Show Details panel is active. The control allows the user to view the Next Appointment for the participant selected in the participant list. The value label will invoke the lookup value corresponding to the AppointmentDate column of the APPOINTMENT table where AppointmentDate is equal to or greater than today's date and less than the AppointmentDate for any other appointment scheduled for the participant. It will invoke as read-only text in the inverse color of the form. Note that the control does not get focus and is not included in the tab order of the dialog.

6.2.1.19 Detail Panel - Telephone Text and Value Label

The control is displayed when the Show Details panel is active. The control allows the user to view the primary telephone number for the household of the participant selected in the participant list. The value label will invoke the lookup value corresponding to the Telephone1 field of the HOUSEHOLD table. It will invoke as read-only text in the inverse color of the form. Note that the control does not get focus and is not included in the tab order of the dialog.

6.2.1.20 Detail Panel - Certification Effective Text and Value Label

The control is displayed when the Show Details panel is active. The control allows the user to view the effective date of the most recent certification period for the participant selected in the participant list. It will invoke as read-only text in the inverse color of the form. The value label will invoke the lookup value corresponding to the CertificationEffectiveDate column of the CERTCONTACT table. Note that the control does not get focus and is not included in the tab order of the dialog.

6.2.1.21 Detail Panel - Certification End Text and Value Label

The control is displayed when the Show Details panel is active. The control allows the user to view the end date of the most recent certification period for the participant selected in the participant list. It will invoke as read-only text in the inverse color of the form. The value label will invoke the lookup value corresponding to the CertificationEndDate column of the CERTCONTACT table. Note that the control does not get focus and is not included in the tab order of the dialog.

6.2.1.22 Detail Panel - Termination Date Text and Value Label

The control is displayed when the Show Details panel is active. The control allows the user to view the termination date for the participant selected in the participant list. If the Terminated field of the MEMBER table is "Y", the value of the Terminated-Date field of the MEMBER table will be invoked. If the Terminated field of the MEMBER table is not "Y", the text, "N/A" will be invoked. It will invoke as read-only text in the inverse color of the form. Note that the control does not get focus and is not included in the tab order of the dialog.

6.2.1.23 Detail Panel - Termination Reason Text and Value Label

The control is displayed when the Show Details panel is active. The control allows the user to view the termination reason for the participant selected in the participant list. When a date is invoked in the Termination Date field, the value label will invoke the description from the ReferenceDictionary table where column CATEGORY = "TERMREASON" associated with the value of the Cert-Termination-Reason field of the CERT-CONTACT table. If "N/A" is invoked in the Termination Date field, the value label will invoke "N/A". It will invoke as read-only text in the inverse color of the form. Note that the control does not get focus and is not included in the tab order of the dialog.

6.2.1.24 Detail Panel - Last Date to Use Group Box

This group box is displayed when the Show Details panel is active. This group box contains the Last Use Date printed on the WIC benefits issued to the selected participant. It also allows the user to view the issuance frequency for the selected participant.

6.2.1.24.1 Detail Panel - Last Date to Use Value Labels

The control is displayed when the Show Details panel is active. The control allows the user to view the Last Use Date printed on the benefits issued to the selected participant. The value label will invoke the value of the Last-Check-LDTU column of the MEMBER table. It will invoke as read-only text in the inverse color of the form. Note that the control does not get focus and is not included in the tab order of the dialog.

6.2.1.24.2 Detail Panel - Issuance Frequency Text and Value Label

The control is displayed when the Show Details panel is active. The control allows the user to view the issuance frequency of the participant selected in the participant list. The value label will invoke the value of the look up value of the IssuanceFrequency column of the MEMBER table. It will invoke as read-only text in the inverse color of the form. Note that the control does not get focus and is not included in the tab order of the dialog.

6.2.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Participant List window.

6.2.2.1 Initializing the Interface

Upon initial presentation of the dialog, the following occurs:

- The name of the clinic selected on the Location dialog (defined in Common Interface Panels Chapter R – Sign On Prompts) is displayed in the title bar, and the title bar text will be set to "[Clinic Name] – Participant List".
- The Where to Search radio button group defaults to the value set for the StaffMember.DefaultsListView. If not set, the value defaults to "Local".
- The State WIC ID radio button is initially selected and the masked edit box is blank.
- The Participant List grid is initially blank.
- The External Data radio button is disabled unless the system is configured to interface with an external data store.
- The Show Details panel is initially hidden.
- If the HideSSN business rule is set to "N", the SSN masked edit box is visible. If the HideSSN business rule is set to "Y", the SSN masked edit box is not visible.

6.2.2.2 Swipe EBT Card

If a magnetic card reader is connected to the computer, configured to work with the Clinic module, and functioning properly, a successful scan of an EBT card as it passes through the reader selects the PAN# radio button, populates the PAN# text box with the PAN read from the EBT card, and completes a search. The search is processed just as if the PAN# radio button had been clicked, the PAN# had been typed, and the Search button had been clicked, except the search is flagged as a "Card Swipe Search," and processed accordingly.

6.2.2.3 Edits for Search Criteria

Upon selection of the Search button, the following edits occur:

- When the State WIC ID radio button is selected and the Where to Search selection is Local, Statewide or External Data and an entry is not made in the State WIC ID field, a standard error dialog is invoked with the text, "An entry is required for the State WIC ID." The State WIC ID is not required if the Where to Search selection is either On-site or Appointments for today even though the State WIC ID radio button is selected by default.

- When the Household ID radio button is selected and an entry is not made in the Household ID field, a standard error dialog is invoked with the text, "An entry is required for the Household ID."
- When the PAN# radio button is selected and an entry is not made in the PAN # field, a standard error dialog is invoked with the text, "An entry is required for the PAN #."
- When the Demographics radio button is selected, if an entry is not made in at least one of the following controls:
  - Last Name text box
  - First Name text box
  - Middle Initial text box
  - Date of Birth masked edit box
  - SSN
  - Agency (when enabled)

  A standard error dialog is invoked with the text, "An entry is required for at least one of the Demographic fields to perform a search."
- If an invalid date is entered in the Date of Birth masked edit box, a standard error dialog is invoked with the text, "Invalid date entered."
- If the value entered into the Date of Birth masked edit box is greater than the system date, a standard error dialog is invoked with the text, "Date entered must be less than or equal to today's date."

6.2.2.4 Display Participant List

Upon successful completion of the above listed edits:

- If the Demographics radio button is selected, a soft search combined with a Soundex search is performed on the SPIRIT database using the values in the Last Name and First Name boxes. (For example, if the user performs a search on the Last Name of "PATTER", a combined Soundex and soft search would yield results similar to the following: PADDER, PADDERSON, PATTER, PATTERSON, POTTER, POTTERSON, POTTERS.) A hard search is performed on the SPIRIT database using the values in the MI, Date of Birth, SSN, and Agency controls.
- If the PAN# radio button is selected, the PAN is relayed to the J.P. Morgan (JPM) Electronic Benefits Transfer (EBT) system, and a hard search is performed on the JPM database to retrieve the Household ID associated with the PAN. The Household ID is then used to perform a hard search of the SPIRIT database for participants with a matching ID.

- If any other radio button is selected, a hard search is performed on the SPIRIT database using the value in the associated box.

The system displays all records found meeting the criteria in the Participant List Grid.

The title of the Participant List window will be set to "Participant List - {name of view} (subset)", where {name of view} is On-site, Local, Statewide, Appointments for Today or External Data based on the radio button selected from the Where to Search radio button group. The first record in the list will be initially selected.

After a successful "Card Swipe Search" the Toggle Applicant/Participant On-site dialog is invoked. When the Toggle Applicant/Participant On-site dialog is dismissed, the View Appointments for Date dialog is invoked if the participant has an appointment scheduled for the date, allowing the appointment to be marked as "Kept."

If no records are found that meet the search criteria, a standard message dialog is invoked with the text, "No participant matching your search criteria could be found " Upon dismissal of the message, focus is returned to the Participant List window preserving the previously entered search criteria.

6.2.2.5 External Data Search

When the "External Data" option is chosen from the "Where to Search" radio button group, the search will not be performed inside the Spirit database. Instead a connection to the External data will be utilized and one of three searches performed with the results placed into the Participant List Grid.

- If the State WIC ID radio button is selected, then the external data will be searched by the external ID.
- If the Demographics radio button is selected and the SSN text box is populated, then the external data will be search by Social Security Number.
- If the Demographics radio button is selected and the SSN text box is NOT populated, then the external data will be searched by Last Name, First Name and Date Of Birth.

The results of these External searches populate the search grid, when the user attempts to open the Participant Folder one of two possible actions are taken. If the selected row contains an External ID number that exists in the SPIRIT system the Participant Folder will launch. But, if the External ID number is unknown to the SPIRIT system, the prescreen form will launch and be populated with the basic participant data returned from the External search. This allows for the creation of a new SPIRIT participant record, without having to re-enter data already entered into the external system.

6.2.2.6 Update Kept Button

Upon clicking the Update Kept button, the system will check the current state of the Kept check box for each participant included in the Participant List grid, and if the value has changed, the system will update the database as follows:

- If the appointment is not a group education class, the system will set the Appointment.AppointmentKept value to "Y" if the check box has been selected and will set the Appointment.AppointmentKept value to "N" if the check box has been cleared.
- If the appointment is a group education class, the system will set the ClassEnrollment.EnrollmentKept value to "Y" if the check box has been selected and will set the ClassEnrollment.EnrollmentKept value to "N" if the check box has been cleared.

6.2.2.7 Clear

Upon selection of the Clear button, the system will clear and reset all controls on the Participant List window.

6.2.2.8 Show Details

Upon selection of the Show Details button, the system will display the details for the selected participant in the Show Details panel.

6.2.2.9 Hide Details

Upon selection of the Hide Details button, the system will hide the Show Details panel.

6.2.2.10 Opening the Participant Folder

When a row (participant record) in the Participant List data grid is double-clicked, the following processes are started:

6.2.2.10.1 Check Permissions to Open the Participant Folder

A check is performed to determine whether the logged-on user has View-level permission or better for the following features:

> Demographics, Height/Weight Blood, Risk Factors, Nutrition Education, Income History, Referrals, Benefit issuance, Food Prescriptions, SOAP Notes, Breastfeeding Notes, General Notes, VENA History, Health Information, Immunizations, Breastfeeding Contacts, Breastpump Management, and Certifications.

- If the user does not have View-level permission for at least one of the features listed above, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view the Participant Folder. Please see the supervisor." When the error dialog is dismissed, focus is returned to the Participant List.
- If the user has View-level permission for any of the features listed above, the Open Participant Folder process continues.

6.2.2.10.2 Check for Participant Transfer

When the above-listed edits are completed successfully, if the participant selected in the Participant List is assigned to a clinic other than the one that was selected on the Location dialog (defined in Common Interface Panels Chapter R – Sign On Prompts) during the log on process, a standard confirmation dialog is invoked with the text, "Do you want to transfer this participant to this clinic?" The No button is the default for the dialog.

- If the user selects the No button on the confirmation dialog, the dialog is dismissed and focus is returned to the Participant List window.
- If the user selects the Yes button on the confirmation dialog, the process continues:

6.2.2.10.2.1 Check Permissions to Transfer a Participant

A check is performed to determine whether the logged-on user has full permission for transferring participants between clinics.

- If the user does not have full permission (ParticipantTransfer.FullControl) to transfer a participant between clinics, a standard error dialog is invoked with the text, "You do not have the necessary permissions to Transfer a Participant. Please see the supervisor." When the error dialog is dismissed, focus is returned to the Participant List.
- If the user has full permission (ParticipantTransfer.FullControl) to transfer a participant between clinics, the Open Participant Folder process continues.

6.2.2.10.2.2 Check for Enabled Electronic Benefit Transfer (EBT) Food Delivery System

When the above-listed edits are completed successfully, a check is performed to determine whether the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.)

- If the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic, a standard message dialog is invoked with the text, "This change to the Household must be communicated to the EBT system. The EBT Household Demographics dialog will open so the data can be sent. The change will only be saved after the successful EBT communication." When the OK button on the message dialog is selected, the EBT Household Demographics dialog defined in Clinic Chapter 11 - Food Instrument Production is invoked.
    - If the EBT Household Demographics dialog is canceled, or the demographics information cannot be transmitted successfully, the Participant Transfer process is terminated, the Open Participant Folder process is terminated, and a standard error dialog is invoked with the text, "The change was not saved because the EBT communication was canceled." When the error dialog is dismissed, focus is returned to the Participant List window.
    - If the EBT Household Demographics dialog is processed and the demographics information is transmitted successfully, the Transfer Participant process continues.
- If the Electronic Benefit Transfer (EBT) food delivery system is not enabled for the clinic, the Transfer Participant process continues.

6.2.2.10.2.3 Transfer Participant

When the above-listed edits are completed successfully, the assigned clinic for the selected participant is changed to the clinic that was selected on the Location dialog (defined in Common Interface Panels Chapter R – Sign On Prompts) during the log on process, the Open Participant Folder process continues.

6.2.2.10.3 Open Participant Folder

When the above-listed edits are completed successfully, the Participant Folder window is invoked for the selected participant. The Participant Folder is defined in Clinic Chapter 09 – Participant Folder.

6.2.2.10.3.1 Check for Participant and Household Alerts

When the Participant Folder window is invoked, a check is performed to determine whether alerts exist for the participant or her household:

- If no alerts exist, focus is given to the Participant Folder window.
- If alerts exist, the following process is started:

6.2.2.10.3.1.1 Check Permissions to View Alerts

A check is performed to determine whether the logged-on user has permissions for viewing alerts. The following processes are repeated for each alert depending on its type:

- For a protected Alert:
    - If the user has the ProtectedAlert.View permission, the Display Alerts dialog defined in Chapter C – Display Alerts for Household Member is invoked, and the alert is added to the Alerts data grid, or if the Display Alerts dialog is already displayed, the alert is added to the Alerts data grid.
    - If the user does not have the ProtectedAlert.View permission, the Display Alerts dialog is not invoked, or if the Display Alerts dialog is already displayed, the alert is not added to the Alerts data grid.
- For an unprotected alert:
    - If the user has the Alert.View permission, the Display Alerts dialog defined in Chapter C – Display Alerts for Household Member is invoked, and the alert is added to the Alerts data grid, or if the Display Alerts dialog is already displayed, the alert is added to the Alerts data grid.
    - If the user does not have the Alert.View permission, the Display Alerts dialog is not invoked, or if the Display Alerts dialog is already displayed, the alert is not added to the Alerts data grid.

6.2.2.11 Saving the Data

Upon clicking the Update Kept button, the system will update the Appointment-Kept column of the APPOINTMENT table to match the selected or cleared state of each check box in the Kept column.

6.2.2.12 Data Map

There are no updateable controls on this dialog; therefore no data is saved to the database.

6.3 Toggle Applicant/Participant On-site

The Toggle Applicant/Participant On-site dialog allows the user to indicate whether an applicant or participant is on-site. Marking an applicant or participant as on-site allows the system to subset the list of applicants or participants on certain functions to only those who are present at all of the clinic's within the agency. The system will automatically remove the participant as marked on-site if food instruments are issued to the participant. However, if a participant does not receive food instruments the user must manually remove them from the on-site list.

The dialog is invoked by performing the following actions:

- Display the Participant List window defined in this document. Select a participant in the Participant List data grid (this requires the successful completion of a search). And, do one of the following:
    - On the Participant List menu, click Toggle Applicant/Participant On-site.
    - Click the Toggle Applicant/Participant On-site toolbar button.
- Display the Participant List window defined in this document. Swipe an EBT card through a magnetic card reader configured to work with the Clinic module. (Upon successful completion of a "Card Swipe Search" on the Participant List window, the Toggle Applicant/Participant On-site dialog is invoked).
- Display the Participant Folder window defined in this document. On the Participant Activities menu, click Toggle Applicant/Participant On-site.

Figure 14 - Toggle Applicant/Participant On-site Dialog

6.3.1 Controls

This section describes the behavior of the controls on the Toggle Applicant/Participant On-site dialog.

6.3.1.1 Applicant/Participant is On-site Check Box

The control allows the user to indicate that the applicant or participant is currently on-site. The check box is enabled when the Toggle Applicant/Participant On-site dialog is active.

6.3.1.2 OK Button

The control allows the user to save any changes made to the applicant or participant and exit the Toggle Applicant/Participant On-site dialog. The OK button is enabled when the Toggle Applicant/Participant On-site dialog is active. Characteristics of the OK button are defined in the Consistencies chapter.

6.3.1.3 Cancel Button

The control allows the user to discard any changes made to the applicant or participant and exit the Toggle Applicant/Participant On-site dialog. The Cancel button is enabled when the Toggle Applicant/Participant On-site dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

6.3.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Toggle Applicant/Participant On-site dialog.

6.3.2.1 Initializing the Interface

Upon initial presentation of the dialog, the following occurs:

- The title bar text will be set to "Toggle Applicant/Participant On-site".
- The Applicant/Participant is On-site check box will initially be blank.
- If the Member.OnPremisesTime is valued, the Applicant/Participant is On-site check box will be checked.

6.3.2.2 Edits

All values on this dialog are considered legitimate.

6.3.2.3 Saving the Data

Upon selection of the OK button, if the Applicant/Participant is On-site check box is checked the system will record the current system time as the Member.OnPremisesTime.

When an alert exists for the participant, or an alert exists for any member of the participant household that is flagged to appear for all members of the household, the system will automatically invoke the Display Alerts dialog defined in Common Interface Panels Chapter C – Display Alerts for Household Member.

When a CPA Review alert exists for the participant, the system will then automatically invoke the CPA Review dialog defined in Common Interface Panels Chapter F – CPA Review. After invoking any alerts and review information, focus is returned to the Participant List.

If the Applicant/Participant is On-site check box is not marked when the OK button is pressed, the system will delete the Member.OnPremisesTime.

Focus is returned to the calling dialog.

6.3.2.4 Cancel

Upon selection of the Cancel button, the Toggle Applicant/Participant On-site dialog is dismissed without saving information and focus is returned to the calling dialog.

6.3.2.5 Data Map

Control Label	**Table**	**Column**	**Business Rule**
Applicant/Participant is On-site	Member	OnPremisesTime	

6.4 Work with On-site Group

The Work with On-site Group dialog displays all certified members of each household for which at least one member has been marked On-site. It allows the user to apply actions to the household members displayed. It is invoked when the Work with On-site Group menu item on the Activities menu is activated.

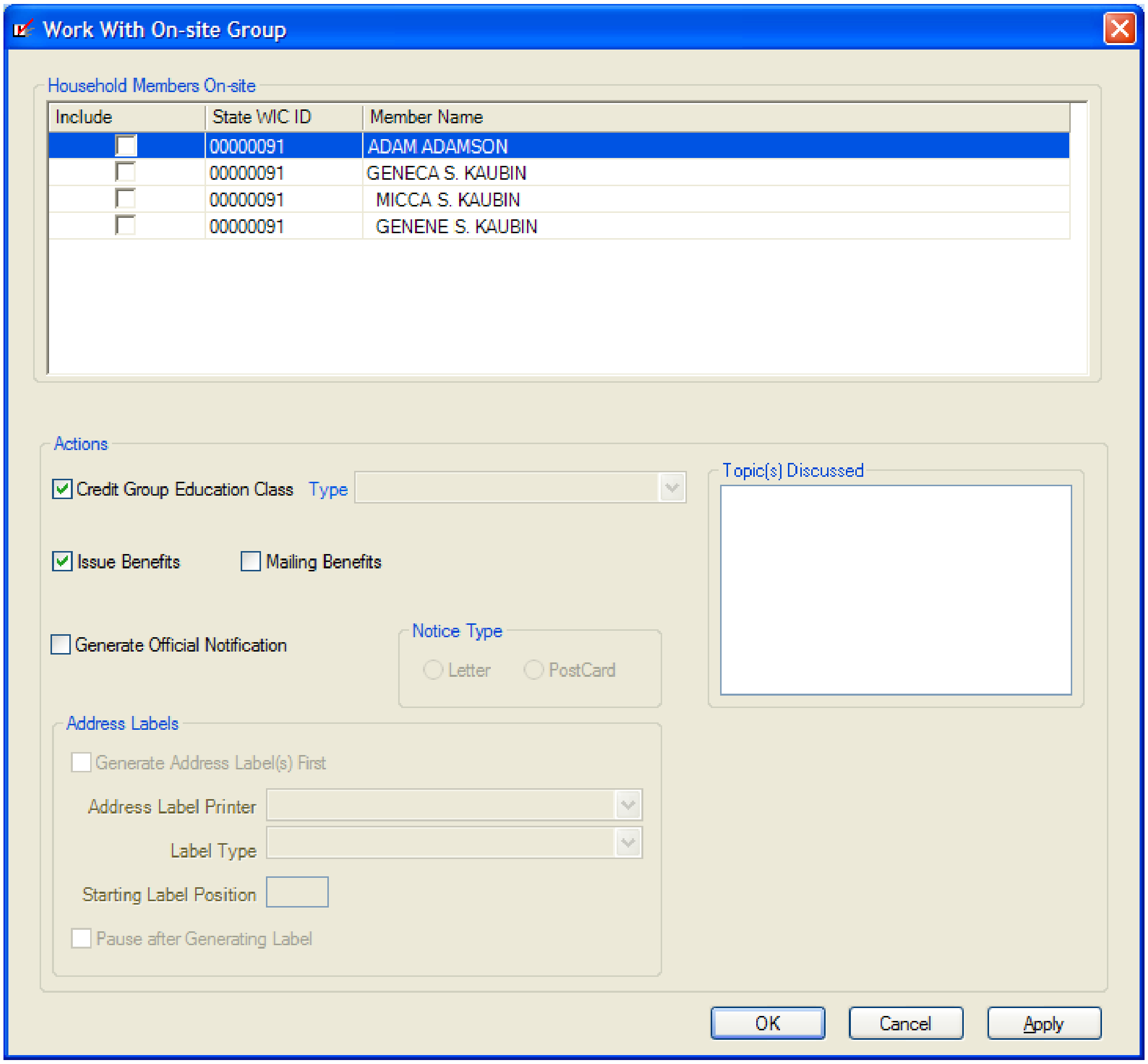

Figure 15 - Work with On-site Group Dialog

6.4.1 Controls

This section describes the behavior of the controls on the Work with On-site Group dialog.

6.4.1.1 Household Members On-site Data Grid

The control displays a list of all certified members of each household for which at least one member has been marked On-site, and allows those members to be selected as targets of selected actions. It is enabled when the dialog is active. The grid includes the following columns:

- Include
- State WIC ID (Member.StateWICID)
- Member Name (Member.FirstName Member.MiddleInitial. Member.LastName)

The grid displays a row for each certified member of each household for which at least one member has been marked On-site. The rows are sorted in ascending order by Household ID, and then in descending order by member Date of Birth within household. All household members after the first are indented slightly to show the household relationship.

The check boxes in the Include column can be selected to include a household member in a selected action or cleared to remove a household member from a selected action. The check boxes are cleared by default. All other columns are read-only.

If a check box in the include column is selected while the Credit Group Education Class check box is selected, the Type drop-down list value is set to, "Secondary Contact," and the Topic(s) Discussed list box is populated with group education topics from the EDUCATIONTOPICS table that are:

- Active
- Of the, "Secondary Contact," Group Contact Type
- Assigned to the participant's WIC Status or unassigned to any WIC Status.

If all the check boxes in the Include column of the Household Members On-site data grid are cleared while the Credit Group Education Class check box is selected, the Type drop-down list value is cleared and the Topic(s) Discussed list box is cleared.

6.4.1.2 Credit Group Education Class Check Box

The control allows the user to credit group education class attendance to household members in the Household Members On-site data grid whose Include check box has been selected.

If the user has the appropriate permissions to credit group education class attendance (NutritionEducation.Add or FullControl), the check box is enabled and selected by default. If the user does not have the appropriate permissions, the check box is disabled and cleared by default.

When the check box is selected and at least one check box in the Include column of the Household Members On-site data grid is selected, the Type drop-down list value is set to, "Secondary Contact," and the Topic(s) Discussed list box is populated with group education topics from the EDUCATIONTOPICS table that are:

- Active
- Of the, "Secondary Contact," Group Contact Type
- Assigned to the participant's WIC Status or unassigned to any WIC Status.

When the check box is cleared or all the check boxes in the Include column of the Household Members On-site data grid are cleared, the Type drop-down list value is cleared and the Topic(s) Discussed list box is cleared.

6.4.1.3 Group Contact Type Drop-down List (Type)

The control allows the user to view the type of nutrition education contact for which the included household members should receive credit. The drop-down list is disabled when the dialog is active. It defaults to blank.

6.4.1.4 Topic(s) Discussed List Box

The control allows the user to select the topics covered at the group nutrition education contact. The list box is enabled when the Credit Group Education Class check box is selected and at least one check box in the Include column of the Household Members On-site data grid is selected. The list box allows the selection of multiple items.

The Topic(s) Discussed list includes group education topics from the EDUCATIONTOPICS table that are:

- Active
- Of the, "Secondary Contact," Group Contact Type
- Assigned to all WIC Statuses or unassigned to any WIC Status.

The topics in the list are sorted alphabetically in ascending order.

6.4.1.5 Issue Benefits Check Box

The control allows the user to specify whether benefits should be produced for the eligible participants selected. The check box is enabled and initially checked when the Work with On-site Group dialog is active and the user has the appropriate permissions (CheckIssuance.Add or Full Control) to create food instruments. If the user does not have the appropriate permissions, the control is disabled.

Upon clearing the Issue Benefits check box, the Mailing Benefits check box is cleared and disabled.

Upon selecting the Issue Benefits check box, the Mailing Benefits check box is enabled.

Note: For EBT Clinics, the Mailing Benefits check box will not display.

6.4.1.6 Mailing Benefits Check Box

The control allows the user to specify that mailing labels should be produced for the participants who receive benefits. The check box is enabled when the Issue Benefits check box is selected.

Upon selecting the check box, the Generate Address Label(s) First check box is enabled.

Upon clearing the check box, if the Generate Official Notification check box is also cleared, the Generate Address Label(s) First check box is cleared and disabled.

Note: For EBT Clinics, the Mailing Benefits check box will not display.

6.4.1.7 Generate Official Notification

The control allows the user to specify that official notifications should be produced for the participants who fit the criteria for those notices. The check box is enabled when the Work with On-site Group dialog is active.

Upon selecting the check box, the following controls are enabled:

- Notice Type
- Generate Address Label(s) First

Upon clearing the check box, the Notice Type radio button group is cleared and disabled, and if the Mailing Benefits check box is also cleared, the Generate Address Label(s) First check box is cleared and disabled.

Note: For EBT Clinics, the Mailing Benefits check box will not display.

6.4.1.8 Notice Type Radio Button Group

The radio button group is enabled when the Generate Official Notification check box is selected. It includes the following radio buttons:

- Letter
- Post Card

6.4.1.9 Generate Address Label(s) First Check Box

The control allows the user to specify that address labels should be generated for selected household members who receive benefits or official notifications. The check box is enabled when either the Mailing Benefits or Generate Official Notification check box is selected.

Note: For EBT Clinics, the Mailing Benefits check box will not display.

Upon selecting the check box, the following controls are enabled:

- Address Label Printer
- Label Type
- Pause after Generating Label

Upon clearing the check box, the following controls are cleared and disabled:

- Address Label Printer
- Label Type
- Pause after Generating Label

6.4.1.10 Address Label Printer Drop-down List

The control allows the user to specify the printer to be used for generating address labels. It is enabled when the Generate Address Label(s) First check box is selected. The drop-down list displays an entry for each label or other output printer defined for the system that is currently active. It defaults to blank.

Upon selecting an address label printer, the Label Type drop-down list is populated.

Upon clearing an address label printer, the Label Type drop-down list is cleared.

6.4.1.11 Label Type Drop-down List

The control allows the user to specify the type of labels to be used for printing address labels. It is enabled when the Generate Address Label(s) First check box is selected. When the Address Label Printer selected is a laser printer, the list is populated label types from the ReferenceDictionary table where Category equals "LaserLabels".

Upon selecting a label type, the Starting Label Position box is enabled.

Upon clearing a label type, Starting Label Position box is cleared and disabled.

6.4.1.12 Starting Label Position Text Box

The control allows the user to specify the starting position to begin printing on the sheet of address labels. It is enabled when a Label Type is selected. The control allows entry of numeric digits. The minimum value is 1 and the maximum value is the number of labels available on the selected label type.

6.4.1.13 Pause after Generating Label Check Box

The check box allows the user to request a pause for paper change after generating labels. It is enabled when the Generate Address Label(s) First check box is selected. It is cleared by default.

6.4.1.14 OK Button

The control allows the user to activate the requested function(s) and invoke the Event Log for Work with On-site Group. The OK button is enabled when the Work with On-site Group dialog is active. Characteristics of the OK button are defined in the Consistencies chapter.

6.4.1.15 Cancel Button

The control allows the user to exit the Work with On-site Group dialog without performing any functions. It will not, however, undo changes made via the Apply button. The Cancel button is enabled when the Work with On-site Group dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

6.4.1.16 Apply Button

The control allows the user to perform the selected functions without exiting the Work with On-site Group dialog. The Apply button is enabled when the Work with On-site Group dialog is active. Its mnemonic is "A".

6.4.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Work with On-site Group dialog.

6.4.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title bar is set to "Work with On-site Group".
- The Household Members grid displays an entry for each participant (Member.StateWICID) (Member.FirstName Member.MiddleInitial. Member.LastName) who has a completed certification or certification attempt and has been marked on site (Member.OnPremesisTime). The rows are sorted first by Household ID then by Date of Birth. If more than one member of the household is marked on-site, the oldest member is displayed first and the other household members display indented. For each participant that has been marked as On-site, all members of the same household who are certified are also displayed in the grid regardless of their own On-site status.

- If no participants are found as being marked on-site the dialog is displayed with an empty list and the OK and Apply buttons are disabled.
- If the user has the appropriate permissions (NutritionEducation.Add or FullControl) to credit group education class attendance, the Credit Group Education Class check box is enabled and initially checked. Otherwise it is disabled and cleared.
- The Group Contact Type drop-down list defaults to disabled and blank.
- The Topics Discussed list box defaults to disabled and blank.
- If the user has the appropriate permissions (CheckIssuance.Add or FullControl) to issue benefits, the Issue Benefits check box is initially enabled and checked. Otherwise it is disabled and cleared.
- The Mailing Benefits check box is initially enabled and cleared. *Note:* For EBT Clinics, the Mailing Benefits check box will not display.
- The Generate Official Notification check box is initially enabled and cleared.
- The Notice Type radio button group is disabled and no radio button is selected.
- The Generate Address Labels check box is initially disabled and cleared.
- The Address Label Printer drop-down list is disabled and blank.
- The Label Type drop-down list is disabled and blank.
- The Starting Label Position text box is disabled and blank.
- The Pause after Generating Label check box is disabled and blank.

6.4.2.2 Edits

Upon selection of the OK or Apply button, the following edits occur:

- If a at least one check box in the Include column of the Households On-site grid is not selected, a standard error dialog is invoked with the text, "At least one household in the Household Members On-site table must be marked as Include."
- If the Credit Group Education Class check box, the Issue Benefits check box and the Generate Official Notification check box are not selected, a standard error dialog is invoked with the text, "An selection is required of at least one of the following: Credit Group Education Class, Issue Benefits or Generate Official Notification".

- If the Group Education Class check box is selected and a selection is not made in the Group Contact Type drop-down list, a standard error dialog is invoked with the text, "A selection is required for the Group Contact Type."
- If the Group Education Class check box is selected and a selection is not made in the Topics Discussed list box, a standard error dialog is invoked with the text, "A selection is required in the Topics Discussed."
- If the Generate Official Notification check box is selected and a selection is not made in the Notice Type radio button group, a standard error dialog is invoked with the text, "A selection is required in the {control label}."
- A standard error dialog is invoked with the text, "A selection is required in the {control label}." if the Mailing Benefits check box or the Generate Address Labels check box is selected and a selection is not made in the following. *Note:* For EBT Clinics, the Mailing Benefits check box will not display.
    - Address Label Printer drop-down list
    - Label Type drop-down list
- If a laser printer is selected from the Address Label Printer drop-down list, and a selection is not made in the Starting Label Position text box, a standard error dialog is invoked with the text, "An entry is required for the Starting Label Position."
- If the value entered in the Starting Label Position text box is greater than the number of labels available on the selected label type, a standard error dialog is invoked with the text, "Starting Label range is 1 through xx." where xx is the number of labels available on the selected label type.

6.4.2.3 Processing Actions

Upon successful completion of the above listed edits, the following actions are begun:

6.4.2.3.1 Crediting Group Education Classes

Upon successful completion of the above listed edits, if the Credit Group Education Class check box is checked, **only** the selected (marked to include) members are credited with a group nutrition education contact for the current system day and the topic of the group education class selected in the Group Education Class drop-down list. The EducationContact table is updated with the following:

- StateWICID - A record is added for all participants selected in the Household Members On-site grid.
- ContactDate - Set to the current system date

- ContactMethod - Set to the ReferenceDictionary.ExternalID where the ReferenceDictionary.Category = "NEMETHOD" and the ReferenceDictionary.Description = "Group".
- ContactType - Set to the value of the Group Contact Type drop-down list.

The EducationContactItem table is updated with the following:

- StateWICID - A record is added for all participants selected in the Household Members On-site grid and each topic selected in the Topics Discussed list box.
- ContactDate - Set to the current system date
- ContactMethod - Set to the ReferenceDictionary.ExternalID where the ReferenceDictionary.Category = "NEMETHOD" and the ReferenceDictionary.Description = "Group".
- ContactType - Set to the value of the Group Contact Type drop-down list.
- TopicCD - Set to the value of the topic selected in the Topics Discussed list box.

If a group education class has already been recorded for the selected StateWICID for this date, the group education class will not be recorded for the participant and a message is written to the Event Log for Work with On-site Group with the text: "Participant {StateWICID} - Only one group education contact is allowed per day. A group education contact for today already exists for this participant."

6.4.2.3.2 Issuing Benefits

If the Issue Benefits check box is checked, food instruments are generated for **all** members of the household who are eligible for benefits **and** have at least one member marked for inclusion in the grid. Refer to Issue Benefits for Participants of On-site Households process in Clinic Chapter 11 – Food Instrument Production.

If the Mailing Benefits check box is also checked, address labels are generated for all household members for whom food instruments are generated. The criteria for generating these address labels and the format of the labels is defined in defined in System Outputs Chapter 01 – System Outputs.

Note: For EBT Clinics, the Mailing Benefits check box will not display.

The On-site status of all members for whom benefits were generated is toggled to Off-site. Members toggled Off-site will still be displayed in the Household Members On-site data grid to avoid the possible confusion that names being removed and rearranged might cause and to give the user a consistent group listing.

6.4.2.3.3 Generating Official Notifications

If the Generate Official Notification check box is checked, an official notification is generated for **all** members of the household who will be terminated by automatic means within 15 days of the current system date **and** have at least one member marked for inclusion in the grid. This includes all household members regardless of their On-site status. The criteria for generating these notices and the format of the notices are defined in System Outputs Chapter 01 – System Outputs.

6.4.2.3.4 Generating Address Labels

If the Generate Address Labels check box is also checked, the system will generate address labels. The criteria for generating these address labels and the format of the labels is defined in System Outputs Chapter 01 – System Outputs.

6.4.2.4 Completing Actions

Upon successful completion of one or more of the above listed actions, the following occurs:

The Event Log - Work with On-site Group dialog is invoked. Once the Work with On-site Group Event Log dialog is dismissed, one of the following occurs:

- If the Apply button was selected to process the actions, focus is returned to the Work with On-site Group dialog, and all check boxes in the Include column of the Household Members On-site data grid are cleared.
- If the OK button was selected to process the actions, the Work with On-site Group dialog is dismissed and focus is returned to the Participant List window.

6.4.2.5 Cancel

Upon selection of the Cancel button, the system will dismiss the Work with On-site Group (Member) dialog and return to the Participant List window.

6.5 View Event Log for Work with On-site Group

The Event Log – Work with On-site Group dialog allows the user to view the event log resulting from processes invoked by the Work with On-site Group dialog. It will also allow the user to print the event log. This dialog is invoked at the completion of the Work with On-site Group process described previously in this document.

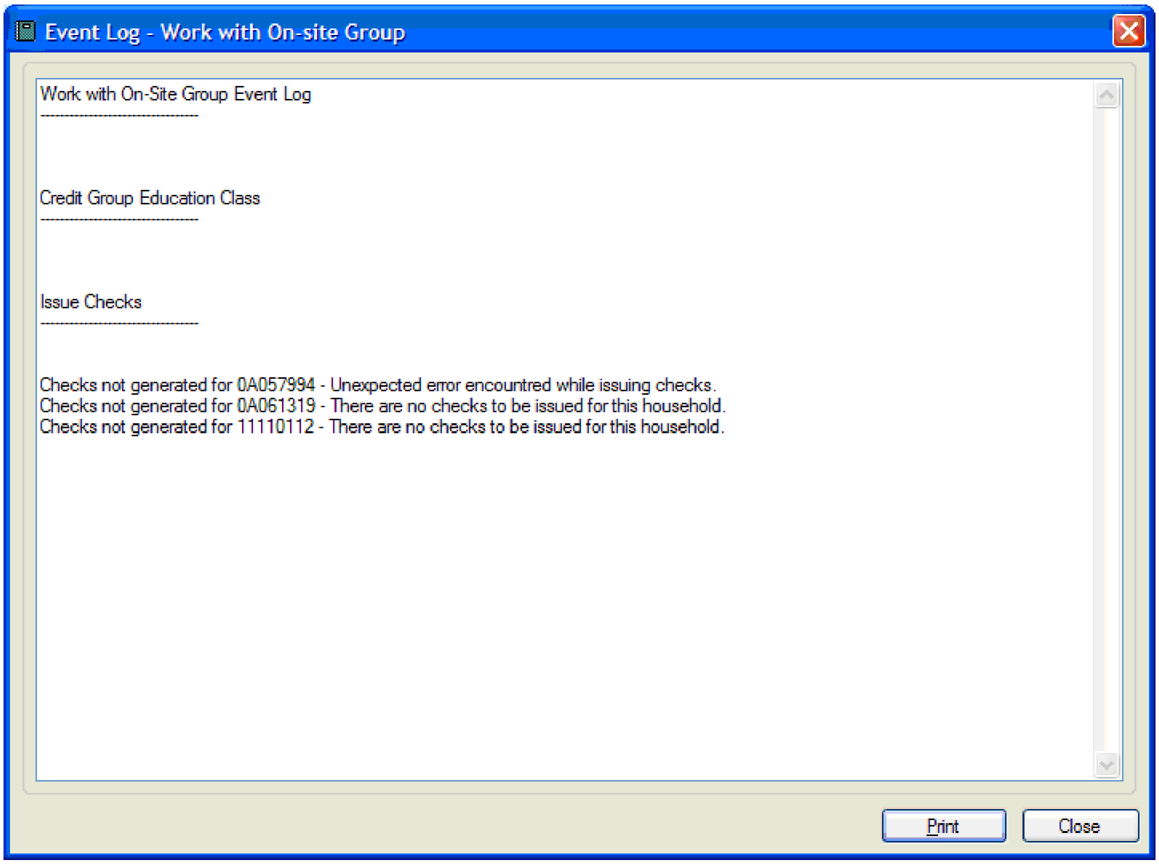

Figure 16 - Event Log – Work with On-site Group Dialog

6.5.1 Controls

This section describes the behavior of the controls on the Event Log – Work with On-site Group dialog.

6.5.1.1 Event Log Text Box

The control allows the user to view the record of events and errors that occurred as a result of the Work with On-site Group processes. The text box is enabled when the Event Log – Work with On-site Group dialog is active. The contents of the control are read-only. When the text exceeds the bounds of the text box, a vertical scroll bar will invoke.

6.5.1.2 Print Button

The control allows the user to print the event log entries in the Event Log text box. The Print button is enabled when the Event Log – Work with On-site Group dialog is active and an Other Output Printer has been defined for the workstation. Its mnemonic is "P".

6.5.1.3 Close Button

The control allows the user to exit the Event Log – Work with On-site Group dialog and return to the Work with On-site Group dialog. The Close button is enabled when the Event Log – Work with On-site Group dialog is active. Characteristics for the Close button are defined in the Consistencies chapter.

6.5.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Event Log – Work with On-site Group dialog.

6.5.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title bar text is set to "Event Log – Work with On-site Group".
- The Event text box displays the content of the events that occurred as a result of the Work with On-site Group dialog. (Credit Group Class, Issue Benefits).

6.5.2.2 Print

Upon selection of the Print button, the system will print the contents of the event log to the currently defined other output printer.

6.5.2.3 Close

Upon selection of the Close button, if this dialog was invoked as a result of selecting the Apply button on the Work with On-site Group dialog, the system will dismiss the Event Log – Work with On-site Group dialog and return to the Work with On-site Group dialog. Upon returning to the Work with On-site Group dialog, this system will uncheck the Include column for all participants who had been previously marked. Participants who were issued benefits as a result of this process will be set as no longer on-site. The list invoked will remain the same until the user closes the Work with On-site Group dialog. This avoids the possible confusion of names being rearranged and gives the user a consistent group listing.

If this dialog was invoked as a result of selecting the OK button on the Work with On-site Group dialog, the system will dismiss the Event Log – Work with On-site Group dialog and return to the Participant List window.

6.6 View Participant Transfer History

This dialog allows the user to view the participants that were transferred out of their agency and match the selected criteria. It is invoked when the user selects the View Participant Transfer History menu item from the Participant List's Activities menu.

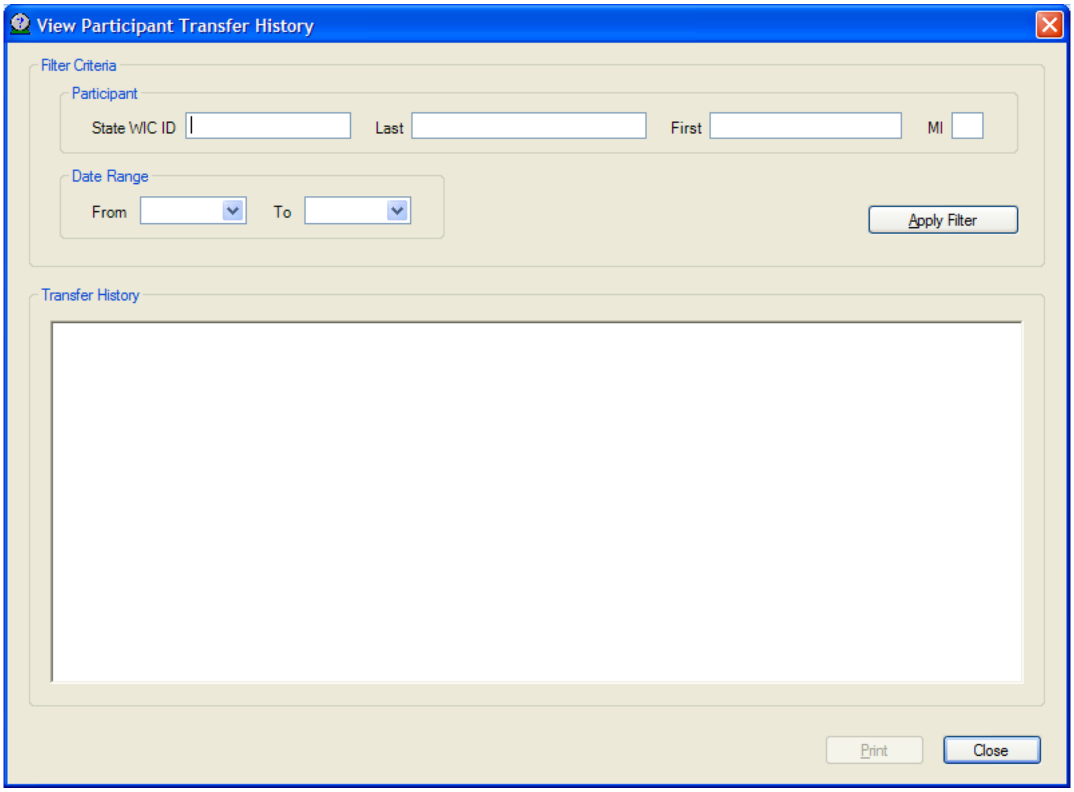

Figure 17 – View Participant Transfer History

6.6.1 Controls

This section describes the behavior of the controls on the View Participant Transfer History dialog.

6.6.1.1 State WIC ID Masked Edit Box

The control allows the user to enter the State WIC ID as part of the filter criteria. The masked edit box is enabled when the View Participant Transfer History dialog is active. It allows the entry of alphabetic and numeric characters.. The mask for the box is "#########". If less than the maximum number of digits is entered into the masked edit box, it will be padded with preceding zeros.

6.6.1.2 Last Name Text Box

The control allows the user to enter all or part of the last name as part of the filter criteria. The text box is enabled when the View Participant Transfer History dialog is active. The value entered in the Last Name text box must only include the characters A-Z, {space}, and the following characters (**' . , -**). It will convert alpha characters to upper case. The maximum length allowed for the value is twenty-five (25) characters.

6.6.1.3 First Name Text Box

The control allows the user to enter all or part of the first name as part of the filter criteria. The text box is enabled when the View Participant Transfer History dialog is active. The value entered in the First Name text box must only include the characters A-Z, {space}, and the following characters (**' . , -**). It will convert alpha characters to upper case. The maximum length allowed for the value is twenty (20) characters.

6.6.1.4 Middle Initial Text Box (MI)

The control allows the user to enter the middle initial as part of the filter criteria. The text box is enabled when the View Participant Transfer History dialog is active. The value entered in the Middle Initial text box must only include the characters A-Z. It will convert alpha characters to upper case. The maximum length allowed for the value is one (1) character.

6.6.1.5 Date Range From Masked Edit Box (From)

The control allows the user to enter the start date of the date range on which to filter the participant transfer history. The masked edit box is enabled when the View Participant Transfer History dialog is active. It will only accept entry of numeric digits. The mask on the box will be "##/##/####" to accept a date with a four-digit year.

6.6.1.6 Date Range To Masked Edit Box (To)

The control allows the user to specify the end date of the date range on which to filter the participant transfer history. The masked edit box is enabled when the View Participant Transfer History dialog is active. It will only accept entry of numeric digits. The mask on the box will be "##/##/####" to accept a date with a four-digit year.

6.6.1.7 Apply Filter Button

The control allows the user to apply the selected filter criteria and populate the Transfer History grid. The button is enabled when the View Participant Transfer History dialog is active. Its mnemonic is "A".

6.6.1.8 Transfer History Grid

The control allows the user to view the participant transfer history that matches the entered criteria.

The grid contains the following columns:

- Transfer Date/Time
- State WIC ID
- Participant Name
- Agency and Clinic Transferred From (From)
- Agency and Clinic Transferred To (To)
- Staff ID

The grid will contain an entry for each participant transferred out of the user's agency that matches the selected filter criteria. The entries will be sorted in ascending order according to the value of the Transfer Date/Time column. The data in the grid is read-only.

6.6.1.9 Print Button

The control allows the user to print the Participant Transfer History report for the selected filter criteria. The button is enabled when the View Participant Transfer History dialog is active and there is at least one entry displayed in the list. Its mnemonic is "P".

6.6.1.10 Close Button

The control allows the user to exit the View Participant Transfer History dialog and focus is returned to the calling dialog. The button is enabled when the View Participant Transfer History dialog is active. Characteristics for the Close button are defined in the Consistencies chapter.

6.6.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the View Participant Transfer History dialog.

6.6.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title bar text will be set to "View Participant Transfer History".
- All controls on this dialog will initially be blank.
- The Transfer History grid will initially be blank.

6.6.2.2 Edits

Upon selection of the Apply Filter button, the following edits occur:

- The system will check for required information. If an entry is not made in at least one of the following controls:
    - State WIC ID masked edit box
    - Last Name text box
    - First Name text box
    - Middle Initial text box
    - Date Range From masked edit box
    - Date Range To masked edit box

  A standard error dialog is invoked with the text, "The State WIC ID, Last Name, First Name, Middle Initial or a date range must be entered before a filter can be applied."
- If the date entered in a Date field is greater than the current system date, a standard error dialog is invoked with the text, "Date entered must be less than or equal to today's date."
- If an invalid date is entered in a Date field, a standard error dialog is invoked with the text, "Invalid date entered."
- If an entry is made in the Date Range From and not the Date Range To, a standard error dialog is invoked with the text, "An entry is required for the To Date."
- If an entry is made in the Date Range To and not the Date Range From, a standard error dialog is invoked with the text, "An entry is required for the From Date."
- If the Date Range From is greater than the Date Range To, a standard error dialog is invoked with the text, "Beginning of date range must be equal to or less than end of date range."

6.6.2.3 Display Transfer History

Upon successful completion of the above listed edits, the system will search for information matching the filter criteria

The system will display the results in the Transfer History grid.

If there is no information matching the selected filter criteria, a standard system message box is invoked with the text, "No information was found matching the search criteria." Upon dismissal of the message box, the user is returned to the View Participant Transfer History dialog.

6.6.2.4 Print

Upon selection of the Print button, the system will send the Participant Transfer History report defined in System Outputs Chapter 01 – System Outputs to the selected other output printer (see System Tools).

6.6.2.5 Close

Upon selection of the Close button, the system will dismiss the View Participant Transfer History dialog and return to the Participant List window.

6.7 Record Replacement Item

The Record Replacement Item dialog is defined in State Office Chapter 07 – Participant Search, Folder and Summary (SO).doc.

The Record Replacement Item dialog allows the user to record that a replacement breastpump was received from the manufacturer to replace one that was damaged. The Record Replacement Item dialog is invoked when the user selects the Record Replacement Item Menu Item from the Activities menu either in the State Office application or the Clinic application.